

CHAPTER 3

CHANGES

CHANGE OF NAME, ADDRESS AND BENEFICIARY FORM

- 1) Change of Name/Address/Beneficiary Forms are to be completed by the member, and forwarded to the Retirement Office. The yellow copy is for your records.
- 2) The employee's name, social security number and county must be entered for identification purposes.
- 3) The address portion of the form does not have to be notarized, but the employee must sign the change before submitting it.
- 4) The name change portion of the form must be notarized.
- 5) The beneficiary portion include the name of the beneficiary, the relationship to the employee, the social security number of the beneficiary and the beneficiary's date of birth. The employee is required to sign the form and have his/her signature notarized. If the form has not been notarized it will be returned for completion.
- 6) If the employee wishes to list more than one beneficiary, he/she may do so. If the employee desires that the beneficiaries share equally, they must bracket all names that apply.

Please advise your employees of the importance of designating a beneficiary and keeping the designation current.

SAMPLE FORM SRS-110C
CHANGE OF NAME/ADDRESS/BENEFICIARY

CHANGING INVESTMENTS

Members may change their investment allocation or the county allocation as often as they wish. Changes must be made in increments of 5%. The sum of the employee and county allocations each must total 100%. Any unallocated employee funds will default to the Stable Fund. Any unallocated county funds will default to the Employer Moderate Fund.

To change investment allocation, you should provide the employee with an Automated Pension Access Line (APAL) brochure and an Ameritas Pension Access On-Line card. The employee will have access to their account information through the APAL and On-Line 24 hours per day, seven days per week. However, they must be prepared to provide their Personal Identification Number (PIN). Without their PIN, the employee will not have access to their account information and changes will not be allowed.

In the event an employee wishes to make changes to their investment allocation and does not have their PIN, they must complete a Change Form.

CHANGING A PERSONAL IDENTIFICATION NUMBER (PIN)

If an employee did not assign themselves a PIN, or has forgotten it, they may assign themselves a new one by completing the Change Form. At the bottom of the form is a section regarding the changing of a PIN. After assigning the PIN, the employee may fax or mail the change directly to Ameritas Life Insurance Corp. at the address or number on the bottom of the form.